COURSE SYLLABUS AND KEY NOTES

FM 9

MECHANICS HANDBOOK

New Terms

OLD TERM (State)	NEW TERM (FleetFocus M5)
Tag Number	Unit Number
Fleet Code	Category Code
Vehicle	Unit
Fuel, Oil	Product

New Definitions

TERM	DEFINITION
Labor Time Card	Used to input working time.
Indirect Account	Any time spent during the work day on tasks outside of a work order.
Indirect Account List for Labor	Lists all the accounts you can use to charge for time spent outside of a work order.

Module Discussion(s)

This manual is a quick reference guide for the State of Tennessee mechanics within the garages and other agency maintenance locations. The manual provides step-by-step instructions related to your daily activities in the garage.

In this reference, you will find information for the following processes in the M5 system:

- Managing work orders
- Entering daily working time
- Viewing basic vehicle information
- Running reports

Course Lesson 1: Work Order Management

Topic Discussion

The work order process begins by first accessing the Work Order Main screen in FleetFocus M5. You may have only one work order open per unit per maintenance location since an open work order designates downtime. However, multiple tasks can be added to the work order as individual jobs. Each job has its own visit reason and downtime status codes (such as "waiting for parts" or "waiting for assignment").   A job code defines the type of maintenance that is to be performed and consists of a work accomplished code, a system code, and a component code. The Work Accomplished Code (WAC) defines the basic type of work, while the system and component codes define where on the unit the maintenance is to be performed.

A work order can be in any of 4 different statuses: open, complete, closed, and canceled. When the work order is in "Open" status, you can insert any transactions such as labor, part and/or commercial charges. When the work order is in "Complete" status, this signals that all jobs are complete and the unit is back on the road. You are still able to make any needed changes or add charges in the complete status.   When a work order is in "Canceled" status, you cannot make any changes. In addition, prior to canceling the work order, you must remove any charges before it can be canceled. When a work order is in "Closed" status, no changes can be made unless you have the database privilege to do so.

After a work order has been created, you can add a job to the work order to specify the type of required maintenance. You add the job by accessing the Work Order Processing frame and selecting the appropriate work order to which the job will be added. Once at the Work Order Main frame, click on the Job tab to add a new job to the work order.

You can add notes to an existing work order when you want to include additional information for a job or to the work order itself.

After a work order has been created and jobs have been added, the work order can be printed if needed.

Topic Learning Activities

1. *Understand Basic Workflow Processing*
2. *Work Order Life Cycle Status*
3. *Adding a Job to a Work Order*
4. *Adding Notes to a Work Order*
5. *Printing a Work Order*

Course Lesson 2: Labor Charges

Topic Discussion

The Labor Time Card screen is a central location for garage personnel to record time for a working day. Use this screen to enter time spent:

- Working on jobs in the garage (direct time)
- Attending meetings (indirect time)
- Taking leave (indirect time)

Entered time is referred to as labor charges in the M5 system. Your supervisor will approve all entered labor charges prior to final processing for payroll. After approvals, these charges will then be interfaced to PeopleSoft for payroll processing.

Note: It is important that you enter your labor charges accurately. This information is reflected in your paycheck.

Labor charges can be entered for either a work order or an indirect account in the M5 system. In this topic, you learn how to charge time to a specific work order and a specific job within that work order. More than one employee can record time to the same job on the same work order.

Labor charges can be applied to a work order or an indirect account. In the M5 system, an indirect account is any time spent during the work day on tasks outside of a work order. Examples include attending a safety meeting for a few hours, cleaning the shop after completed maintenance, or taking a day of sick leave.

Note: Enter any leave time taken in the Labor Time Card since this information is reflected on your paycheck and your leave balances.

If you enter any incorrect information, you can correct the hours you've worked. This process is taken care of on the Labor Time Card frame. In addition, you may delete an entire labor entry row on the Labor Time Card if it was incorrectly entered. Deleting the entry completely removes it from the timecard. All labor charges entered on the Labor Time Card must be approved in order for the data to be interfaced into PeopleSoft for payroll processing.

Topic Learning Activities

1. *Entering Time in a Labor Time Card (Work Order)*
2. *Entering Time in a Labor Time Card (Indirect Account)*
3. *Correcting Hours Worked on a Job/Indirect Account*
4. *Deleting a Labor Entry*

Course Lesson 3: Vehicle Information

Topic Discussion

Units in the M5 systems are assets that may or may not require maintenance tracking. Units include not only vehicles and equipment; compressors, radios, or anything defined as an asset to be managed are also units. All information related to a unit can be viewed on the Unit Main frame. The Unit Main frame is view-only. Detailed unit information is managed at a higher level within the organization to ensure data is kept accurate and current.

You can view unit information on the Unit Main frame in the M5 system. The Unit Main screen contains a unit information section and five sections with additional unit detail: Asset/Codes, Dept/Locations, Employee/Class, Meter, and License/Notes. You can select hyperlinks to view other screens that reference the specific unit.

Topic Learning Activities

1. *Displaying Basic Unit Information*

Course Lesson 4: Queries

Topic Discussion

Queries allow you to enter basic search criteria into a specific query frame in order to view your desired information. You can make a query as specific or as broad as is needed.

The Work Order Query allows you to view work orders for units, departments, or components. You can set your criteria to have the system return specific or general results.

The Tech Spec/Unit Item Query is used to view a specific unit and its associated technical specifications along with any additional items that are associated with this unit.

These items may not exist for every unit in the system, as each of these individual items must be set up separately on the Unit Item or Tech Spec item frames.

Topic Learning Activities

1. *Running a Work Order Query*
2. *Running a Tech Spec/Unit Item Query*

Course Review with Question and Comments

Evaluation